

JACKSON HOLE TRAVEL AND TOURISM BOARD

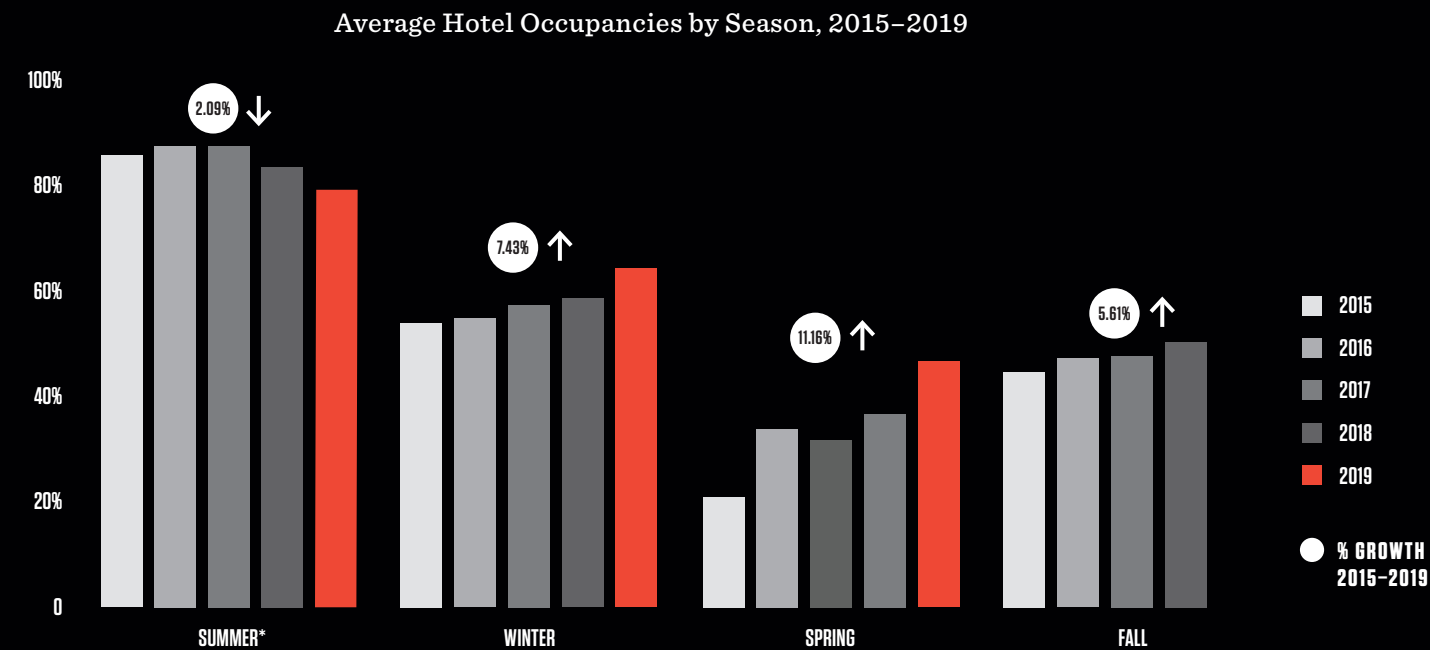
ANNUAL REPORT
FISCAL YEAR 2019
07.01.18—06.30.19



STAY WILD.

Jackson Hole is more than a destination. We're a community. And our ultimate goal is to create a sustainable economy where families can live year-round. Tourism is a big part of our economy, but tourism needs to be consistent and manageable.

So we launched a movement called Stay Wild. The campaign serves as a rally cry for the fall, winter and spring. One that locals can believe in and adventure seekers want to be a part of. We combined a message of preservation, conservation and culture into a simple but powerful call to action, urging locals and tourists to help keep Jackson Hole raw, rugged and wild.



SOURCE: DESTIMETRICS
*SUMMER 2019 OCCUPANCY NUMBERS ESTIMATED

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A MESSAGE FROM OUR CHAIRMAN

Welcome to the fourth edition of the Jackson Hole Travel & Tourism Board (JHTTB) annual report. The mission of the JHTTB is to effectively spend lodging tax funds to promote travel and tourism to Teton County in a manner that is consistent with the shared values of our community. Our promotional efforts are focused solely on driving visitation in the fall, winter and spring. This strategy seeks to fill excess capacity during these seasons, leading to a more stable year-round tourism economy for our valley.


Destination marketing continues to be more competitive than ever. Today’s travelers have limited time and resources to vacation and enjoy many compelling options to choose from when planning their trips. The role of the JHTTB is to tell a compelling story differentiating our destination while at the same time targeting a very specific visitor — one that is seeking an authentic, meaningful experience and shares our appreciation of the outdoors and stewardship to the natural environment.

This report outlines the success of our efforts illustrated by the growth in tax revenue, occupancies and visitation. Sales and lodging tax revenue generated from our visitors is integral to the town and counties budgets and Teton County households. If not for the taxes generated by the tourism industry, the average household in Teton County would have had to pay \$6,854 more in taxes for existing government services. Tourism is also the number one employer in the valley, supporting 8,950 jobs. We are fortunate to maintain this revenue stream and high level of employment as other counties across the state suffer budget shortfalls and layoffs due to their dependency on minerals.

Our Stay Wild campaign this year continued to focus on sustainability and environmental stewardship by incorporating new ‘Keep Jackson Hole Wild’ responsible tourism messaging. This campaign segment highlights the importance of protecting and preserving our natural assets now and for future generations. Keep Jackson Hole Wild shares six tenants of responsible tourism, including a Tag Responsibly campaign that is the first of its kind and received national and international attention. As the Stay Wild campaign continues to attract visitors that want to experience their inner wild and all that Jackson offers, Keep Jackson Hole Wild works to educate the visitor and imparts our values as a community.

We hope you take a moment to review this report to learn more about how the JHTTB is deploying lodging tax funds to further the vitality of our economy, community and culture.

Regards,



Brian Gallagher, Chairman
Jackson Hole Travel & Tourism Board

TRAVEL & TOURISM AT WORK FOR TETON COUNTY



In 2018, Teton County welcomed 1,837,000 overnight visitors to the area.

Domestic and international travelers spent **\$1.24 billion** in Teton County and generated **\$65 million** in state and local taxes. This tax revenue is used to support public infrastructure such as streets and roads, fire and police protection, and many other public services in Teton County.

Visitors paid **58%** of all sales tax collections in Teton County.



If not for the taxes generated by the travel and tourism industry, the average household in Teton County would have had to pay **\$6,854** more in taxes for existing government services.

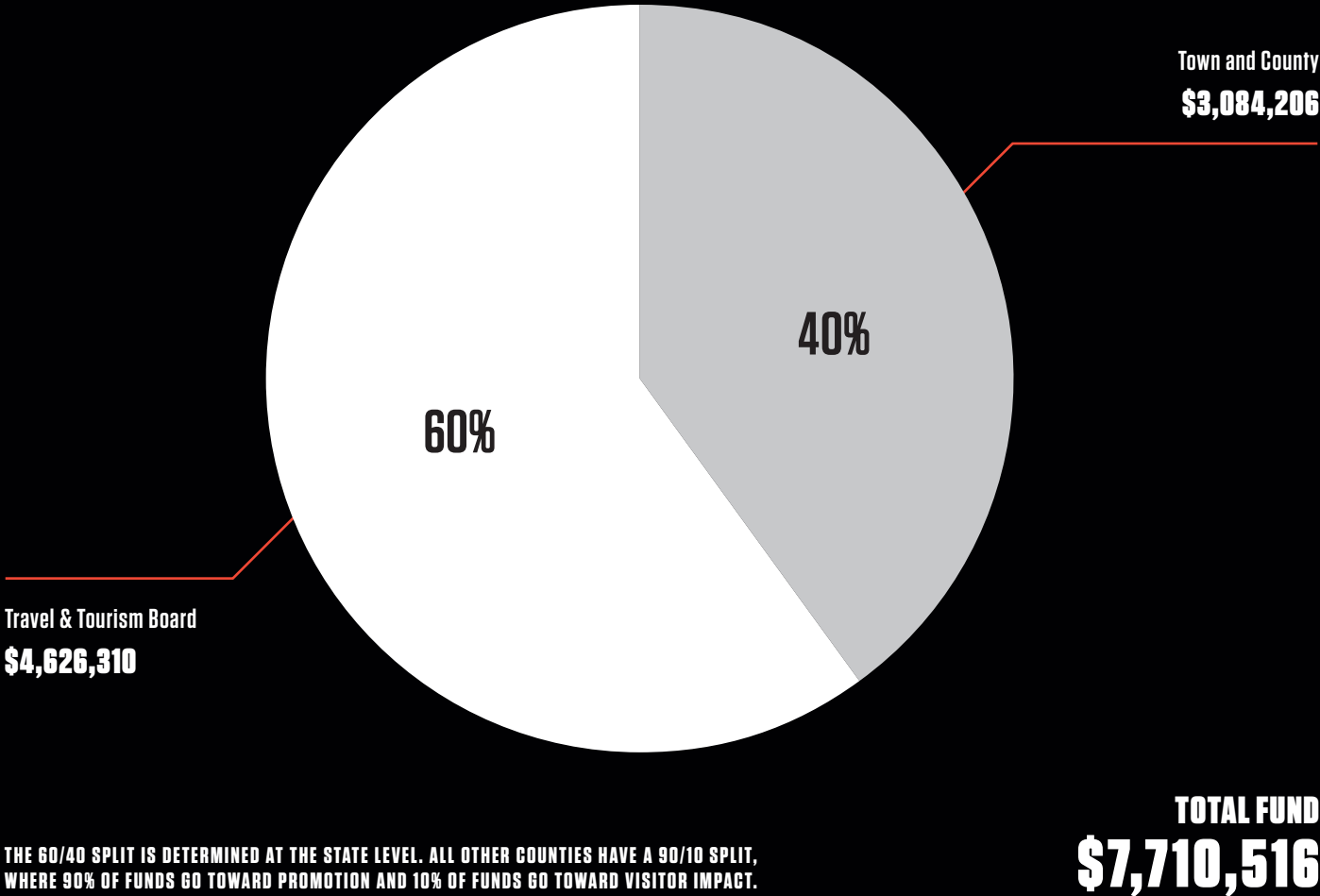


In 2018, travelers generated **8,950 jobs** in Teton County.

Travelers supported 27% of Teton County’s total private industry employment. Without the jobs generated by the travel industry, the 2018 Teton County unemployment rate of 3% would have been **30%.***

SOURCES: DEAN RUNYAN ASSOCIATES, TRAVEL IMPACT REPORT, MARCH 2019; U.S. BUREAU OF ECONOMIC ANALYSIS; U.S. BUREAU OF LABOR STATISTICS; WYOMING DEPT. OF REVENUE; WYOMING DEPT. OF A&I, DIVISION OF ECONOMIC ANALYSIS.

The lodging tax is a 2% tax that is added to a visitor’s stay in any Teton County hotel, motel or rental property. It was voted in by residents of Teton County in November 2010. Dubbed the “tax you don’t pay,” this money is collected from tourists visiting the valley. The Jackson Hole Travel & Tourism Joint Powers Board is responsible for allocating 60% of the collected funds. Teton County and the town government are responsible for allocating the remaining 40% of funds collected.



WHAT TOURISM MEANS FOR US

FOR OUR COUNTY

PUBLIC SAFETY

In FY 2019, \$150,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Jackson Hole Fire/EMS Department. The mission of Jackson Hole Fire/EMS is the protection of life and property from the adverse effects of fires and medical emergencies, and exposure to man-made and/or natural dangerous conditions.

PARKS AND RECREATION

In FY 2019, \$355,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Parks & Recreation Department. This funding provided support for activities including, but not limited to, snow plowing, trash pickup, and general park cleaning and maintenance.

PATHWAYS

In FY 2019, over \$40,000 of the revenue to Teton County from the lodging tax was expended to support the Pathways system. This funding provided support for asphalt repairs, wayfinding signage, pathway benches and general maintenance.

PUBLIC TRANSPORTATION

In FY 2019, nearly \$458,823 of the revenue to Teton County from the lodging tax was expended to support the general operations of the START bus system, as well as bus transportation to Grand Targhee. These systems provide local and regional transportation services to both residents and visitors.

JACKSON HOLE HISTORICAL SOCIETY AND MUSEUM

In FY 2019, \$150,000 of the revenue to Teton County from the lodging tax was expended for the general operations of the Historical Society and Museum, which collects, preserves and explores the region’s rich history and creates educational programs to preserve and promote the unique character of Jackson Hole.

GLOBAL TIES WYOMING

In FY 2019, \$5,000 of the revenue to Teton County from the lodging tax was expended for general operations of Global Ties Wyoming, an organization that brings international dignitaries to Teton County to meet with elected officials and organizations about government and tourism.

PUBLIC AWARENESS

In FY 2019, \$4,350 of the revenue to Teton County from the lodging tax was expended for Public Awareness, a line item used for expenditures that arise after the budget is adopted, such as special advertising and special projects.

FOR OUR TOWN

TRANSPORTATION

In FY 2019, roughly 36% of the income received by the town of Jackson through the lodging tax was used to fund the START system. START provides reliable transportation services to our commuters and mitigates tourist traffic by providing easy transportation options. By partnering with Friends of Pathways, we’ve also expanded transportation services to now include a bike share program.

PARKS AND PATHWAYS

In FY 2019, \$483,064 of the income received by the town of Jackson through the lodging tax was used to maintain or improve Jackson/Teton County parks and pathways. Our parks and pathways provide recreation for visitors and tourists while preserving the natural landscape in a responsible way.

PUBLIC SAFETY

In FY 2019, \$282,050 of the income received by the town of Jackson through the lodging tax was allocated to this nonrestricted fund. Money from this account was utilized to fund the general operations of several town departments, including but not limited to the Jackson Police Department, the Jackson Hole Fire/EMS Department, the town of Jackson Victim Services Department and the town of Jackson. The benefit of a nonrestricted allocation of funds is the ability for financial discretion, especially as unforeseen events occur or unplanned needs arise.



SOUTHERN TETON AREA RAPID TRANSIT (START)



HISTORICAL SOCIETY



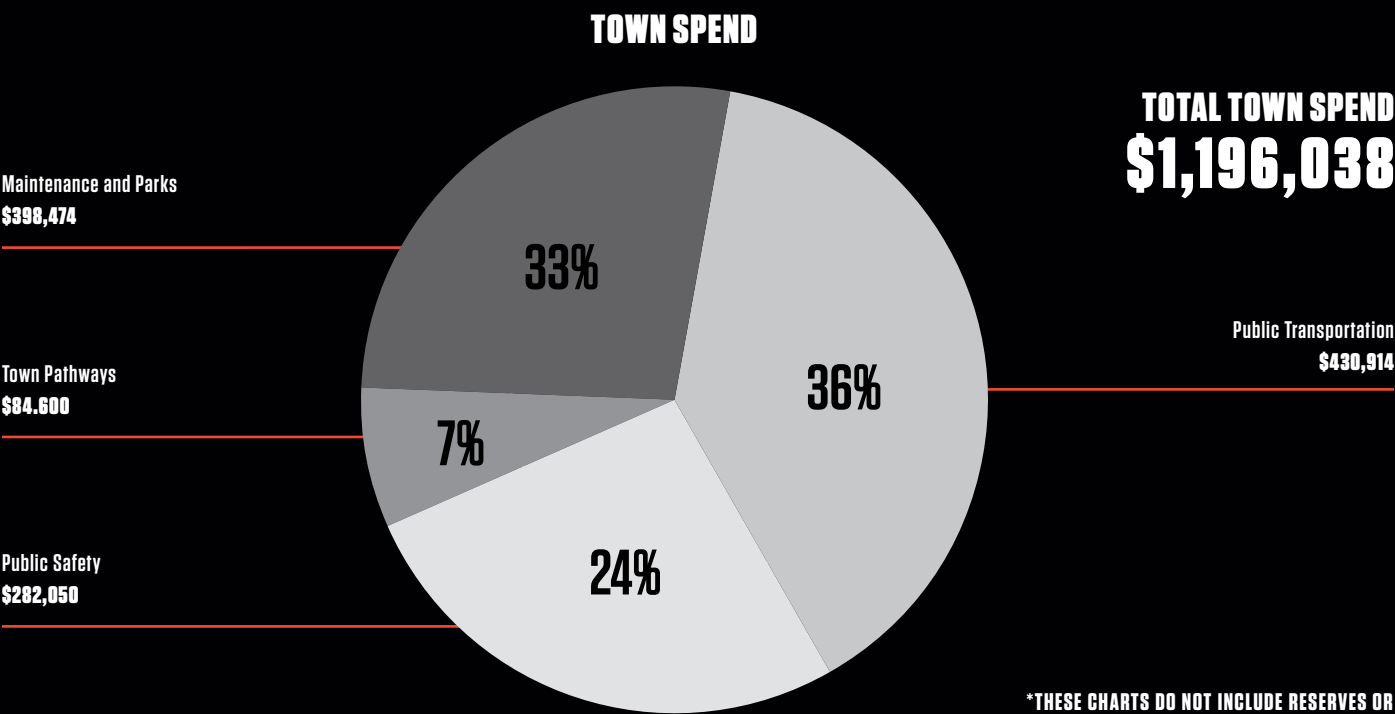
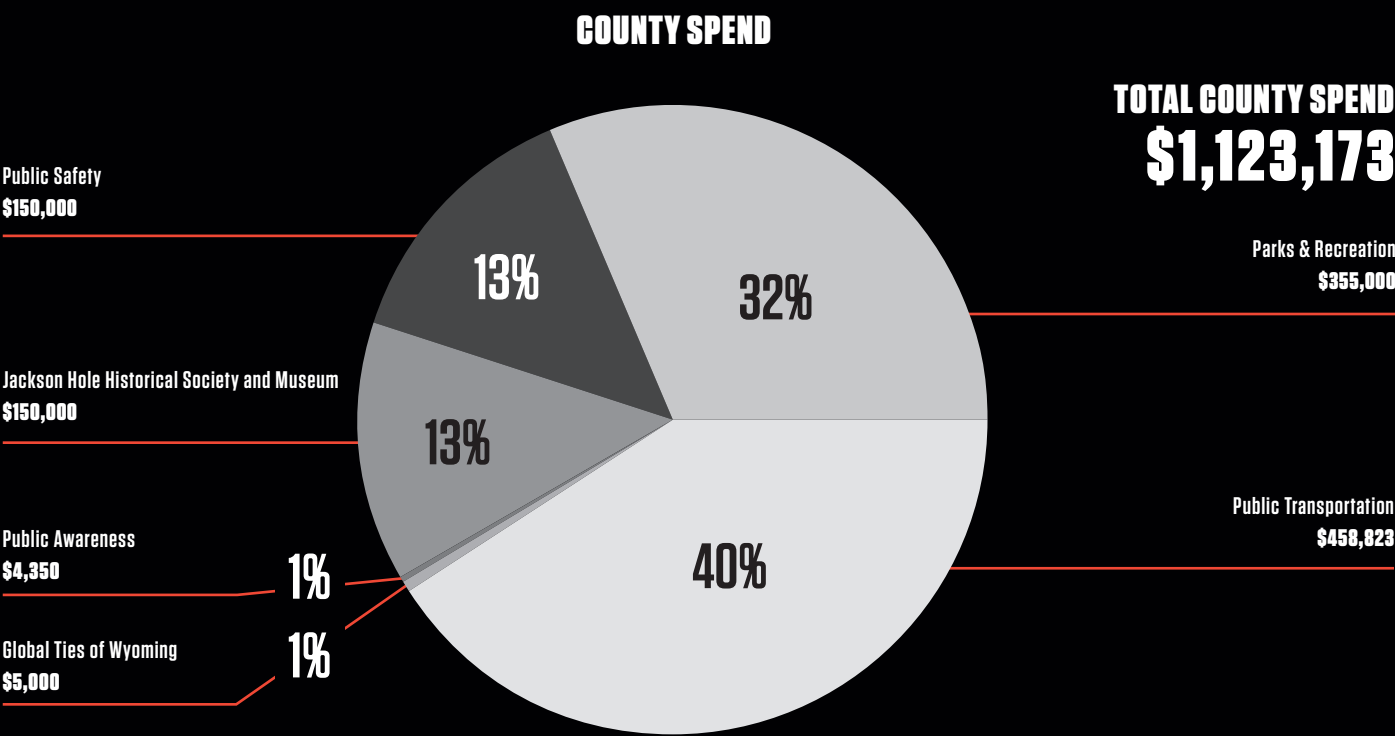
JACKSON HOLE FIRE/EMS DEPARTMENT

Teton County and the town of Jackson are responsible for 40% of the funds collected annually from the countywide 2% lodging tax.

The town and county split this 40% based upon point of sale. The town’s portion of this income is then split into a restricted fund (75%) and a general fund (25%).

The revenue from the lodging tax is used primarily to address the impact that millions of visitors have each year on our community, but it’s also reinvested into Teton County. These funds help build a sustainable economic force and high quality of life for our residents.

COUNTY & TOWN SPENDING*



*THESE CHARTS DO NOT INCLUDE RESERVES OR COLLECTIONS CARRIED OVER FROM PREVIOUS YEARS.

JACKSON HOLE TRAVEL & TOURISM BOARD MEMBERS 2018

BRIAN GALLAGHER

Joined the Board in 2016
Chairman
CityPASS

CORY CARLSON

Joined the Board in 2017
Vice Chairman
Four Seasons Resort and
Residences Jackson Hole

ERIK DOMBROSKI

Joined the Board in 2018
Treasurer
The Yarrow Group

BRIAN MODENA

Joined the Board in 2016
Secretary
TMBR Creative Agency

ALEX KLEIN

Joined the Board in 2014
Grand Teton Lodge Company

WILLI BROOKS

Joined the Board in 2017
Center for the Arts

CRISTA VALENTINO

Joined the Board in 2017
Current, LLC

JACKSON HOLE TRAVEL & TOURISM BOARD SUPPORT

KATE SOLLITT

Executive Director,
joined 2012
JHTTB

MAUREEN MURPHY

Event Liaison
Jackson Hole Chamber
of Commerce

PARTNER ORGANIZATIONS

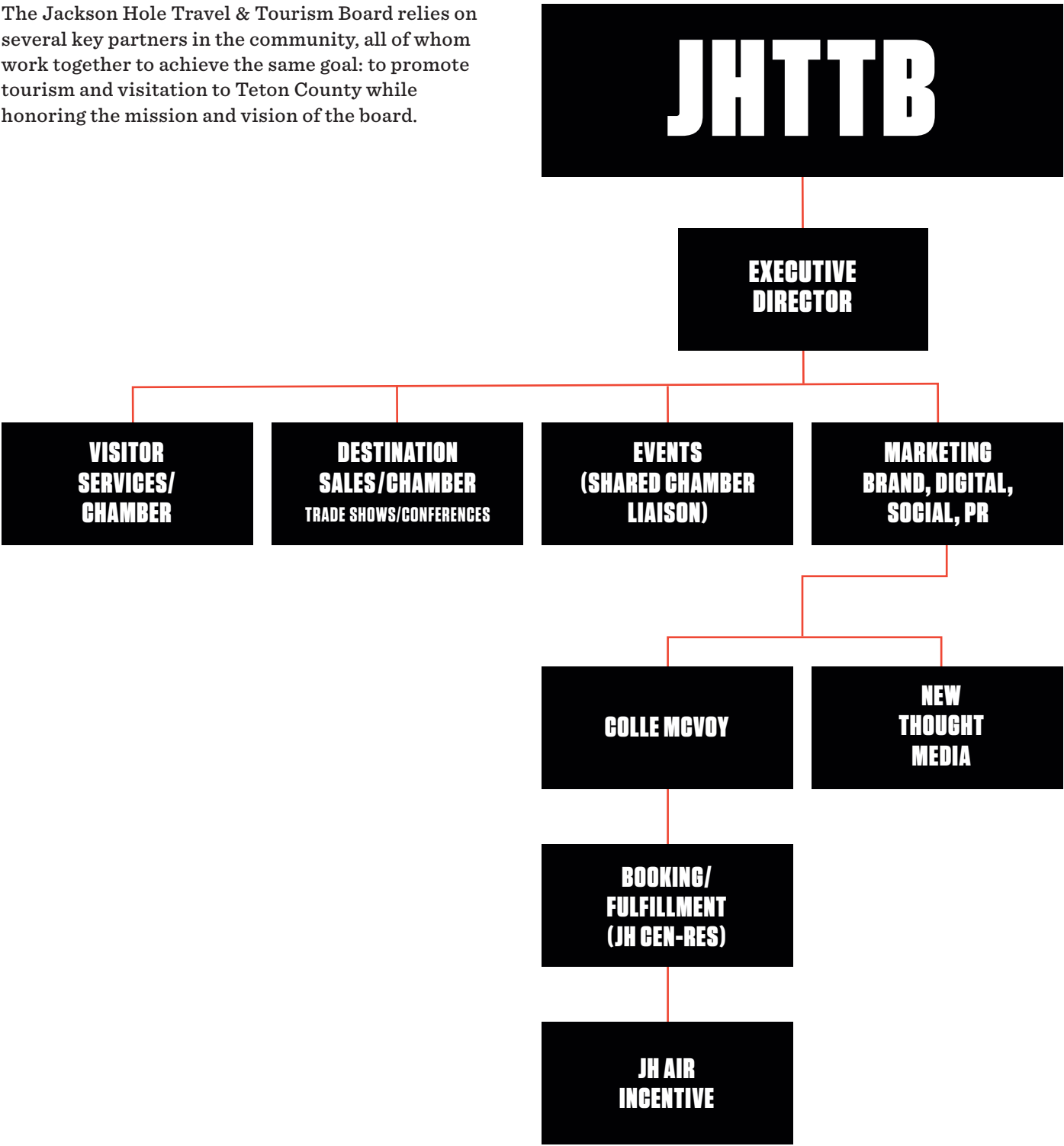
Jackson Hole Chamber
of Commerce

Jackson Hole Central
Reservations

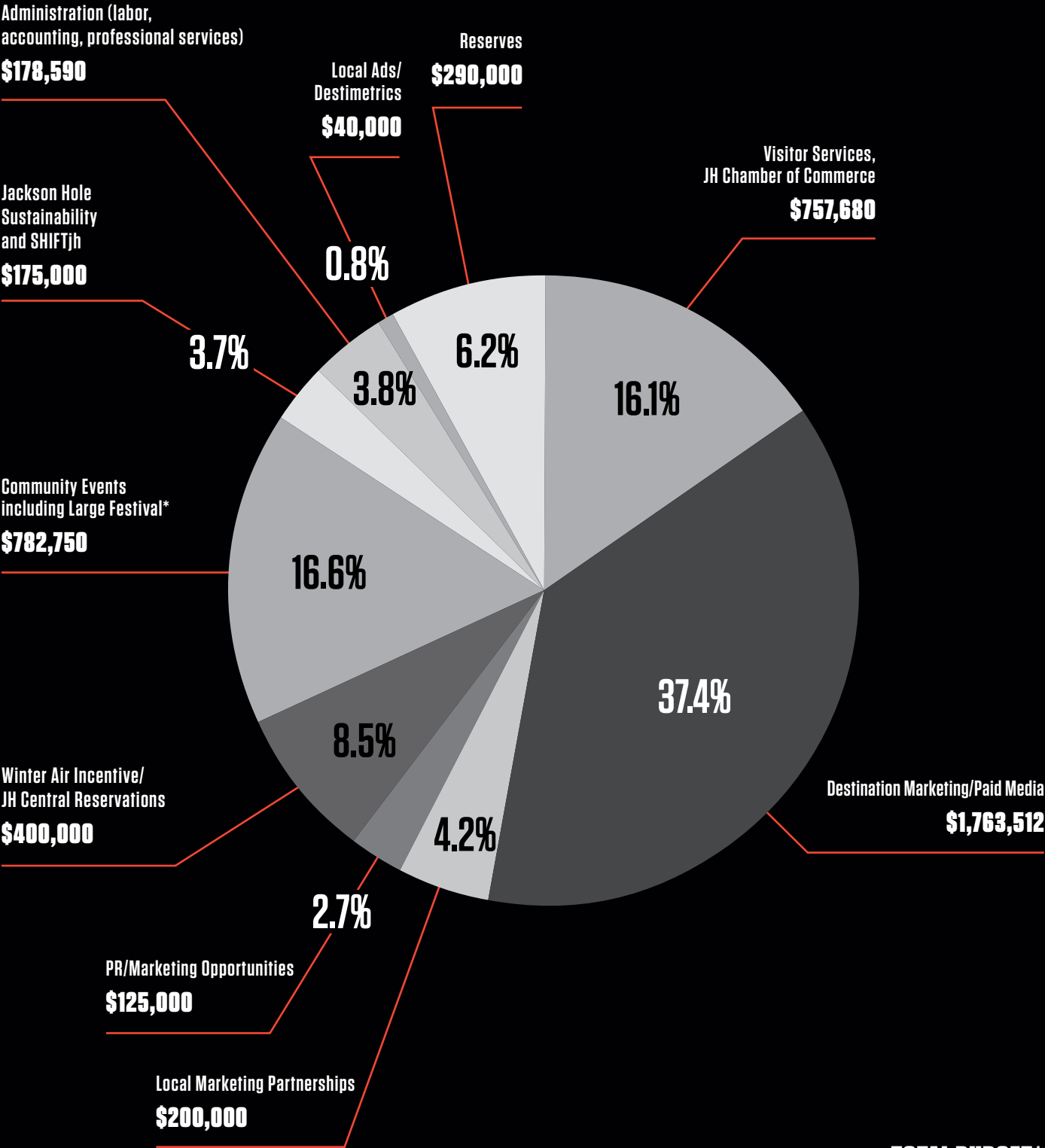
Jackson Hole Air

JHTTB PARTNERS

The Jackson Hole Travel & Tourism Board relies on several key partners in the community, all of whom work together to achieve the same goal: to promote tourism and visitation to Teton County while honoring the mission and vision of the board.



FY 2019 JHTTB BUDGET BREAKDOWN



*INCLUDES COMMUNITY EVENT COORDINATOR.
**BUDGET SLIGHTLY HIGHER THAN COLLECTIONS DUE TO EXCESS COLLECTIONS CARRIED OVER FROM PREVIOUS YEARS.

TOTAL BUDGET**
\$4,712,532



PARTIALLY
FUNDED
BY THE
LODGING
TAX

TETON COUNTY SEARCH AND RESCUE

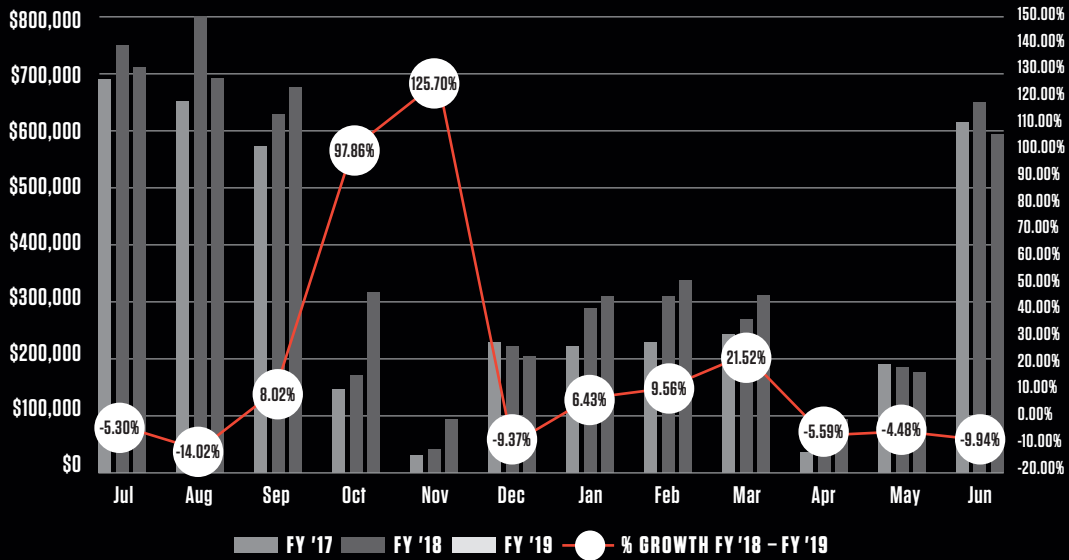


RENDEZVOUS FESTIVAL

JHTTB LODGING TAX RECEIPTS

JHTTB Lodging Tax Receipts

Month	FY '17	FY '18	FY '19	% Growth FY '16-FY '17	% Growth FY '17-FY '18	% Growth FY '18- FY '19
July	\$695,036.89	\$756,692.47	\$716,556.41	7.65%	8.87%	-5.30%
August	\$652,667.72	\$808,700.01	\$695,339.54	5.97%	23.91%	-14.02%
September	\$568,441.53	\$631,843.45	\$682,496.27	9.54%	11.15%	8.02%
October	\$137,841.29	\$162,461.40	\$321,445.04	17.48%	17.86%	97.86%
November	\$28,667.30	\$39,833.63	\$89,904.71	3.41%	38.95%	125.70%
December	\$232,181.16	\$225,544.01	\$204,404.67	20.35%	-2.86%	-9.37%
January	\$221,001.31	\$289,662.30	\$308,278.95	13.44%	31.07%	6.43%
February	\$226,223.25	\$311,313.63	\$341,078.00	1.79%	37.61%	9.56%
March	\$237,648.60	\$262,295.72	\$318,747.78	5.79%	10.37%	21.52%
April	\$32,595.33	\$101,285.99	\$95,625.76	15.13%	210.74%	-5.59%
May	\$198,898.90	\$194,369.92	\$185,656.58	5.49%	-2.28%	-4.48%
June	\$613,388.16	\$658,053.09	\$592,641.44	7.93%	7.28%	-9.94%
Total	\$3,844,591.44	\$4,442,055.62	\$4,552,175.15	8.44%	15.54%	25.00%



THESE TAX RECEIPTS REPRESENT ONLY THE JHTTB PORTION AND ARE ACTUAL ADJUSTED NUMBERS.

JHTTB MISSION & VISION

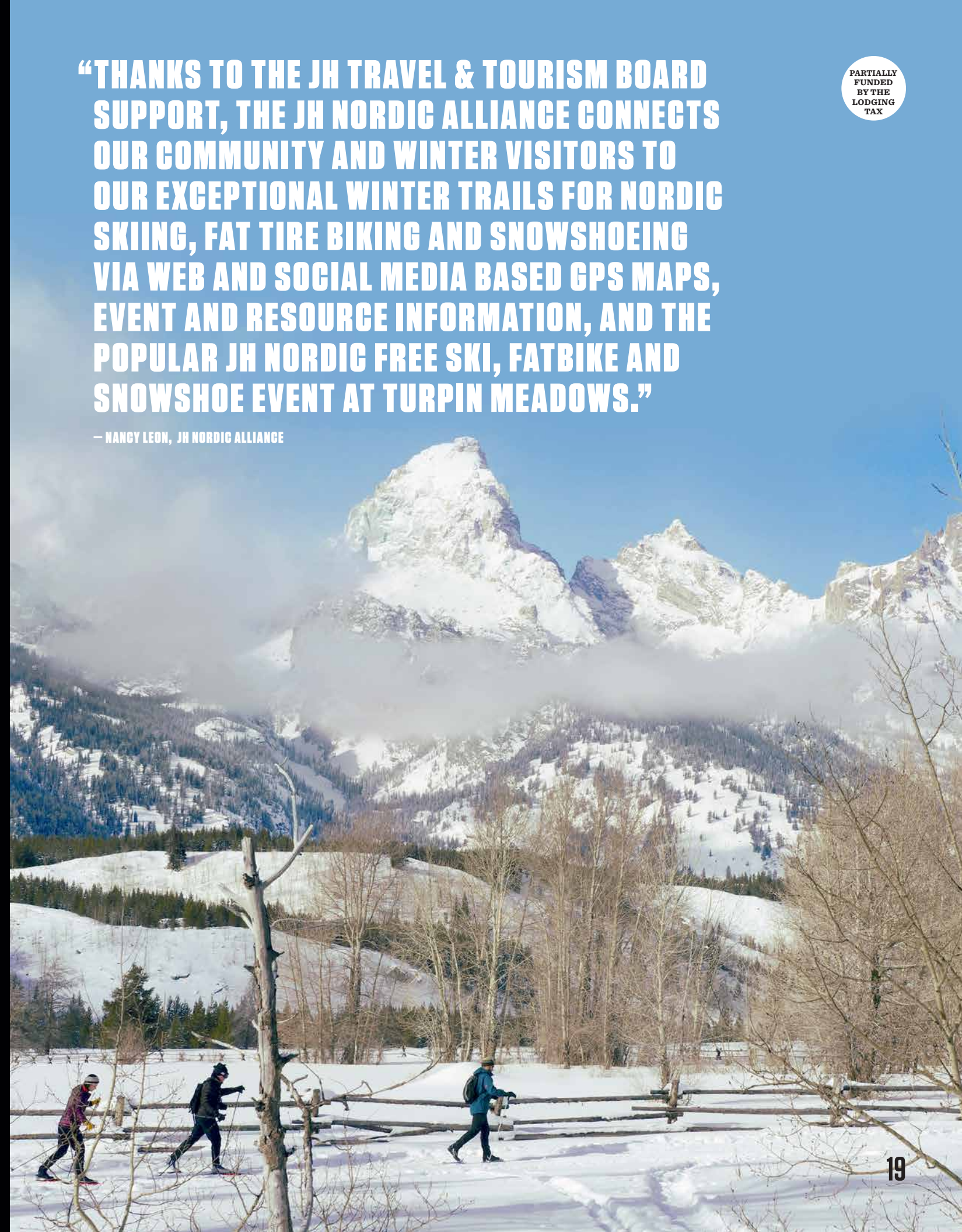
Our mission: To effectively spend lodging tax funds to promote travel and tourism to Teton County in a manner that is consistent with the shared values of our community. Our contributions will reflect stewardship of our natural resources, highlight our outstanding assets and amenities, and strive toward sustainability.

Our vision: As a world leader in responsible tourism, the JHTTB is dedicated to developing a healthy and vibrant fall, winter and spring economy that preserves our natural capital and enhances the well-being of our community.

“THANKS TO THE JH TRAVEL & TOURISM BOARD SUPPORT, THE JH NORDIC ALLIANCE CONNECTS OUR COMMUNITY AND WINTER VISITORS TO OUR EXCEPTIONAL WINTER TRAILS FOR NORDIC SKIING, FAT TIRE BIKING AND SNOWSHOEING VIA WEB AND SOCIAL MEDIA BASED GPS MAPS, EVENT AND RESOURCE INFORMATION, AND THE POPULAR JH NORDIC FREE SKI, FATBIKE AND SNOWSHOE EVENT AT TURPIN MEADOWS.”

— NANCY LEON, JH NORDIC ALLIANCE

PARTIALLY
FUNDED
BY THE
LODGING
TAX



A COMMUNITY WE SUPPORT



“JACKSON HOLE SKI AND SNOWBOARD EVENTS PROVIDE AN OPPORTUNITY FOR ATHLETES FROM AROUND THE REGION, COUNTRY AND THE WORLD TO COMPETE HERE IN JACKSON AT OUR SPECTACULAR VENUES! WE COULD NOT HOST THEM WITHOUT THE FUNDING AND SUPPORT FROM THE JHTTB.”

— BRIAN KRILL, EXECUTIVE DIRECTOR, JACKSON HOLE SKI & SNOWBOARD CLUB



JACKSON HOLE SKI & SNOWBOARD CLUB



JACKSON HOLE SKI & SNOWBOARD CLUB

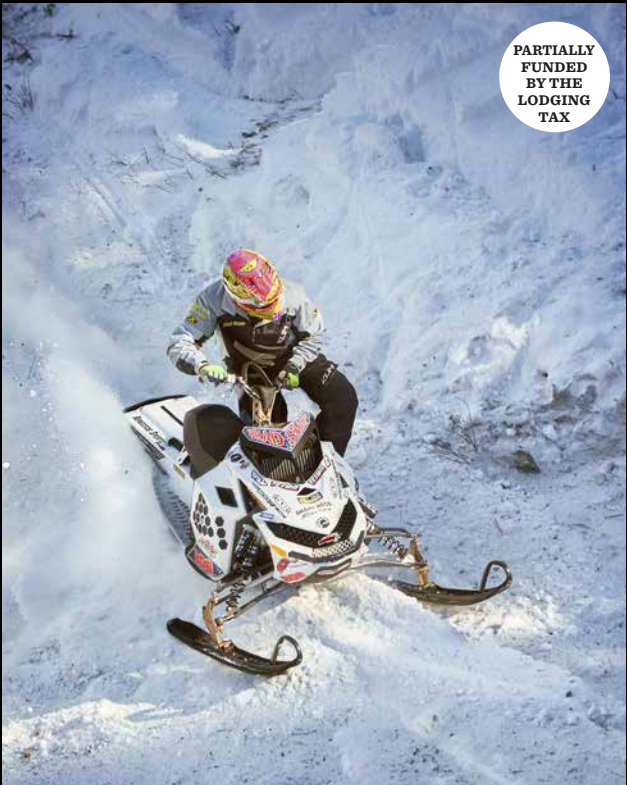


JHSC MOOSE CHASE

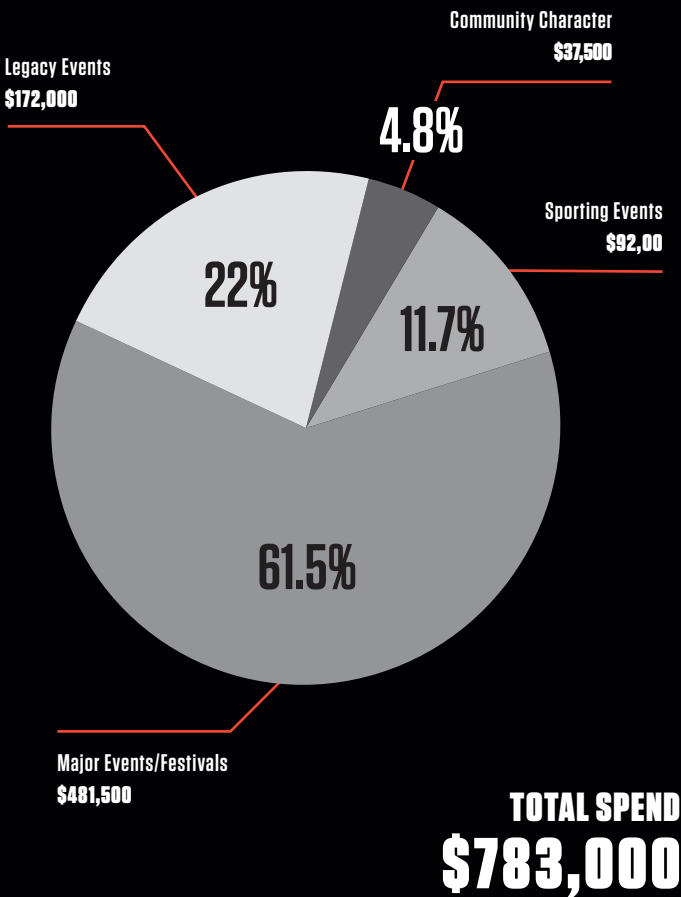
JHTTB-FUNDED
COMMUNITY EVENTS

“SINCE 1974, THE WORLD CHAMPIONSHIP SNOWMOBILE HILL CLIMB HAS BEEN HOSTED AT SNOW KING AND PRODUCED BY THE SNOW DEVILS. AS AN ALL-VOLUNTEER ORGANIZATION WHOSE MISSION IS TO PROMOTE SNOWMOBILING AS A FAMILY SPORT AND GIVE BACK TO LOCAL CHARITABLE ORGANIZATIONS, WE FIND THE FUNDING FROM THE JHTTB INVALUABLE IN HELPING US SUSTAIN THIS EVENT.”

— JEFF TOOLSON, PRESIDENT, JACKSON HOLE SNOW DEVILS



WORLD CHAMPIONSHIP SNOWMOBILE HILL CLIMB



FALL	Veterans Day Basketball	JH Youth Basketball	\$2,000	FALL TOTAL \$167,000
	Women in Leadership Summit	CWC, WLRA,CFArts	\$3,000	
	Wild Fest	JHWild	\$3,000	
	TEDx JH	TEDx JH	\$3,000	
	JH Culinary Conference	CWC Jackson	\$3,000	
	World Above the Tetons	Wyoming Stargazing	\$3,000	
	Wyoming Snow and Avalanche	TCSAR	\$10,000	
	14th Annual Fall Classic	JH Youth Soccer	\$10,000	
	Fireman's Ball	Jackson Firefighters	\$10,000	
	Early Season Training and Events	Jackson Hole Ski and Snowboard Club	\$20,000	
WINTER	Shift Festival	Center for Jackson Hole	\$100,000	WINTER TOTAL \$548,500
	Who Dunit?	Art Association	\$1,500	
	People's Market	Slow Food in the Tetons	\$1,500	
	JH Winter Wonderland	Grand Teton Skating Club	\$1,500	
	3rd Annual Ski/Fat Tire Bike Event	JH Nordic Alliance	\$3,000	
	The Princess and the Pea	Dancer's Workshop	\$3,000	
	JH Wildlife Symposium	Northern Rockies	\$3,000	
	Annual Messiah Sing-Along	JH Chorale	\$3,000	
	Special Olympics	Wyoming Special Olympics	\$5,000	
	Backcountry Ski and Snowboard	Arc'teryx	\$5,000	
SPRING	Triple Crown Race Series	Jackson Hole Ski and Snowboard Club	\$12,000	SPRING TOTAL \$67,500
	Pedigree Sled-Dog Race	Pedigree Stagestop	\$15,000	
	Junior Event Series	Jackson Hole Ski and Snowboard Club	\$20,000	
	Jackson Hole WinterFest	JH Food and Wine Fest	\$25,000	
	43rd Annual Hillclimb	Snowdevils	\$30,000	
	Championship Snowcross	Snowking Mountain	\$60,000	
	Jackson Hole Rendezvous Festival	JHMR	\$360,000	
	Spring People's Market	Slow Food in the Tetons	\$1,500	
	7th Annual Touch-a-Truck	JH Children's Museum	\$3,000	
	JH Ecofair	Energy Conservation works	\$3,000	
	JH Half Marathon	JH Half	\$5,000	TOTAL BUDGET \$783,000
	The Ultimate Towner (Obstacle Course)	The Ultimate Towner	\$10,000	
	JH Mountain Roundup	JH Lacrosse	\$10,000	
	ElkFest and Old West Days	JH Chamber of Commerce	\$35,000	

CHAMBER OF COMMERCE SUPPORTED SERVICES

VISITOR SERVICES LOCATIONS (4)

Total visits: 329,030
Jackson Hole and Greater Yellowstone Visitor Center
Summer: 48% / Shoulder seasons: 52%

Total visits: 27,080
Chamber of Commerce Main Office
Summer: 57% / Shoulder seasons: 43%

Total visits: 84,100
Jackson Hole Airport
Winter: 100%

Total visits: 144,473
Home Ranch Welcome Center
Summer: 66% / Shoulder seasons: 34%

Hotel referrals: 23,476
Summer: 46% / Shoulder seasons: 54%

Inquiry mailings: 21,284
Inquiry emails: 16,310
Inquiry phone calls: 12,667

EVENTS DEPARTMENT

Facilitate the process of the event grant cycles

Coordinate event managers from Travel and Tourism Board-sponsored events to maximize marketing efforts and exposure

Work with the sub-committee for special events to coordinate and facilitate event festival periods, including January through May and October through December

DESTINATION GLOBAL SALES

Provide destination representation at 18 major trade shows domestically and internationally for individual and group businesses

Provide opportunities for local businesses to participate in tradeshow

Support PR events in international markets in conjunction with local businesses

Facilitate face-to-face interaction with travel writers, travel agents, tour operators, meeting planners and consumers worldwide

Oversee visiting travel writers, tour operators and meeting planners; create itineraries and experiences based on their focus to better educate them about the offerings and opportunities that exist in Teton County

Conduct over 800 meetings and interact with more than 1,800 consumers annually worldwide

Focus on promoting winter, fall and spring months



JACKSON HOLE CHAMBER OF COMMERCE DESTINATION SALES



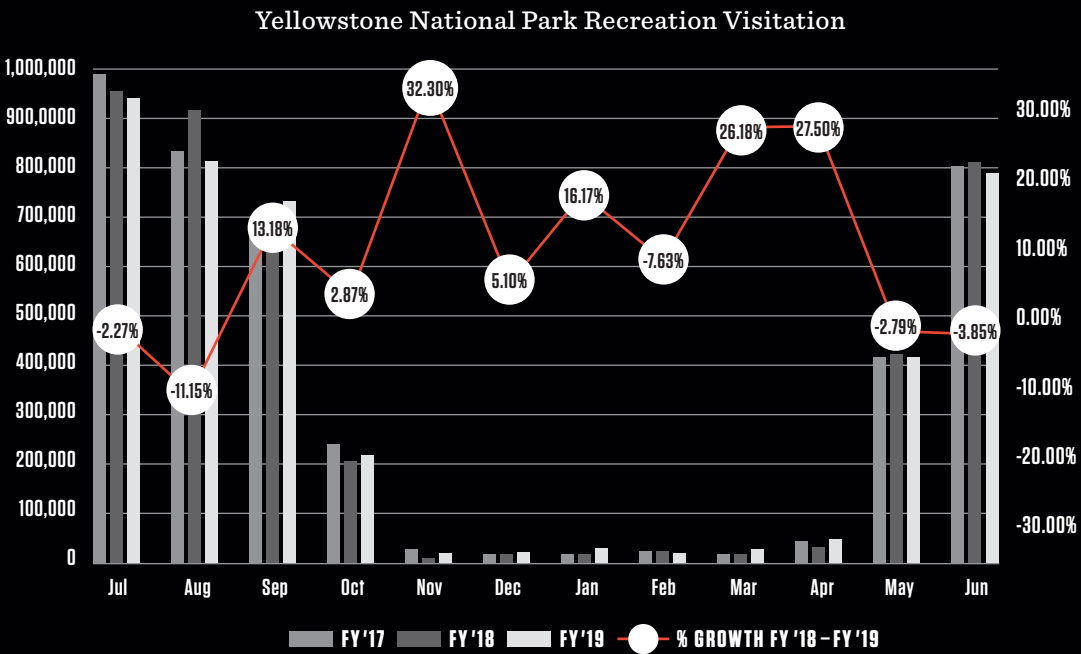
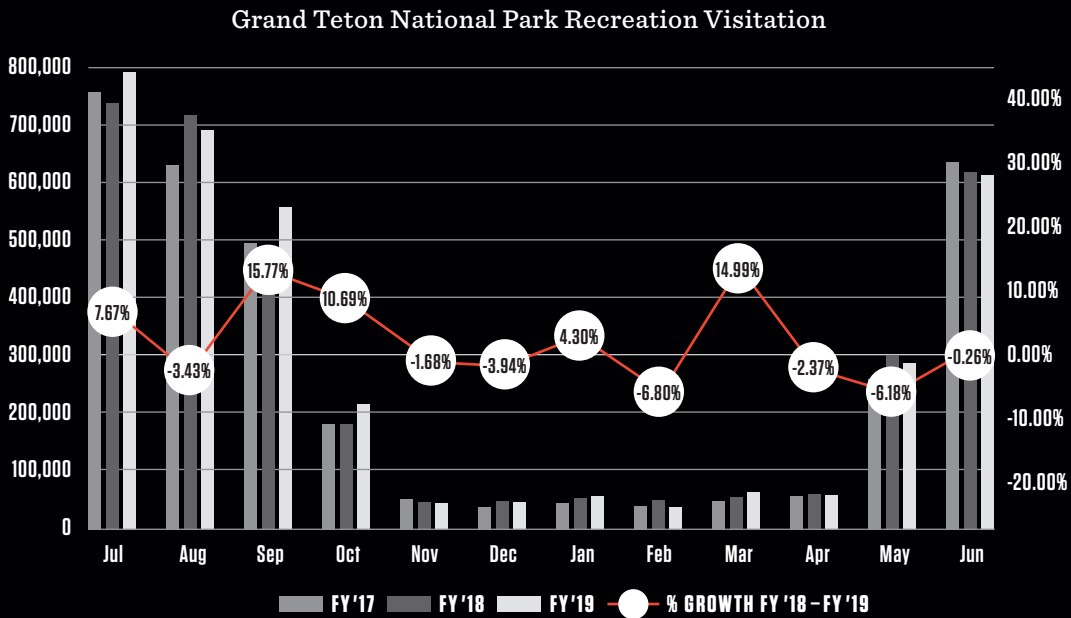
VISITOR SERVICE AGENT



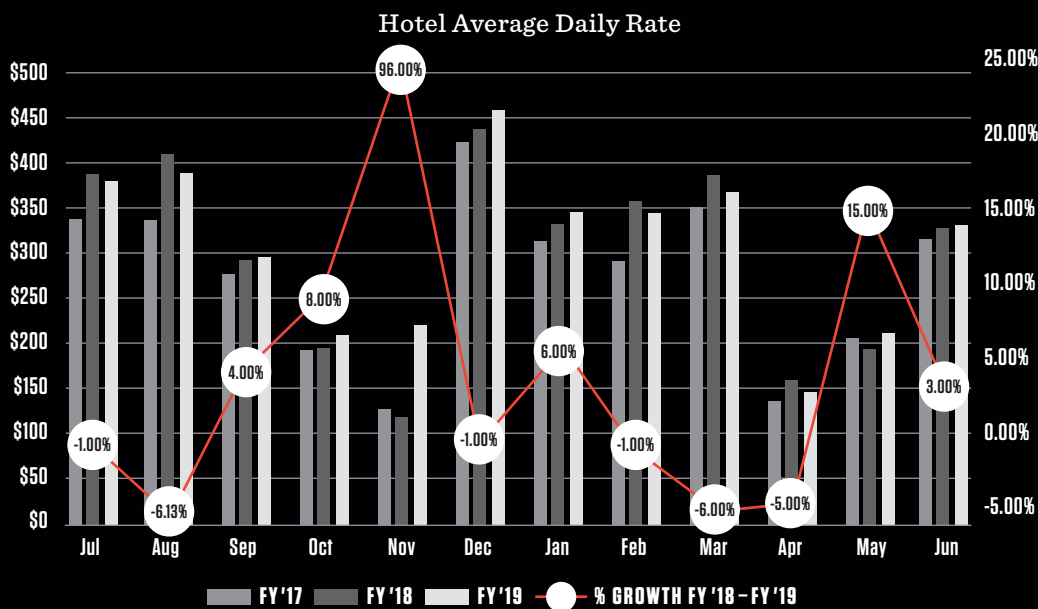
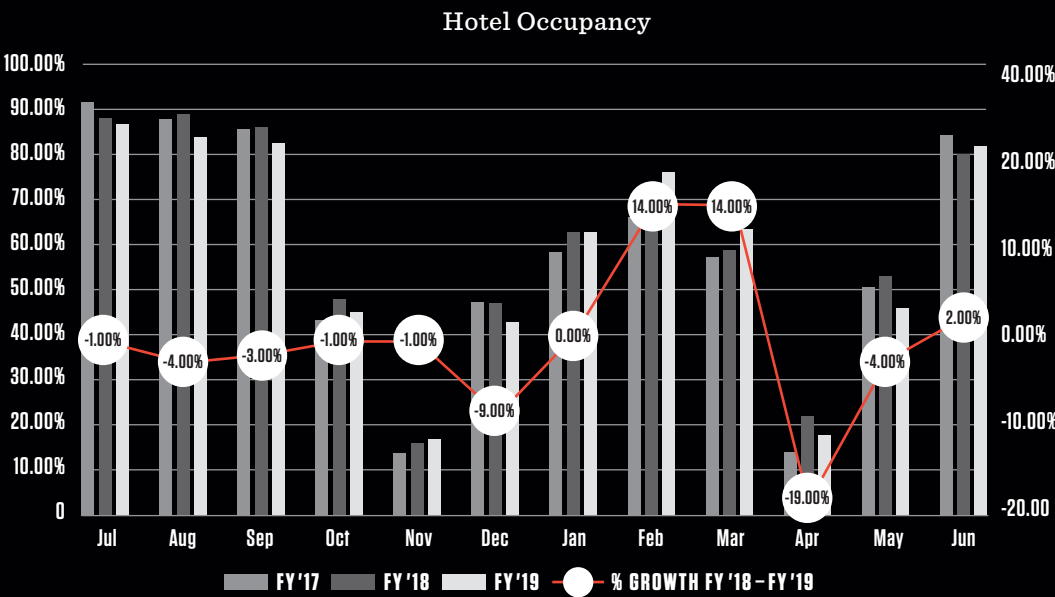
VISITOR CENTER



NATIONAL PARK VISITATION



HOTEL OCCUPANCY AND AVERAGE DAILY RATE



NUMBERS ADJUST MONTHLY BASED ON REPORTING.
SOURCE: DESTIMETRICS



JACKSON HOLE RENDEZVOUS SPRING FESTIVAL



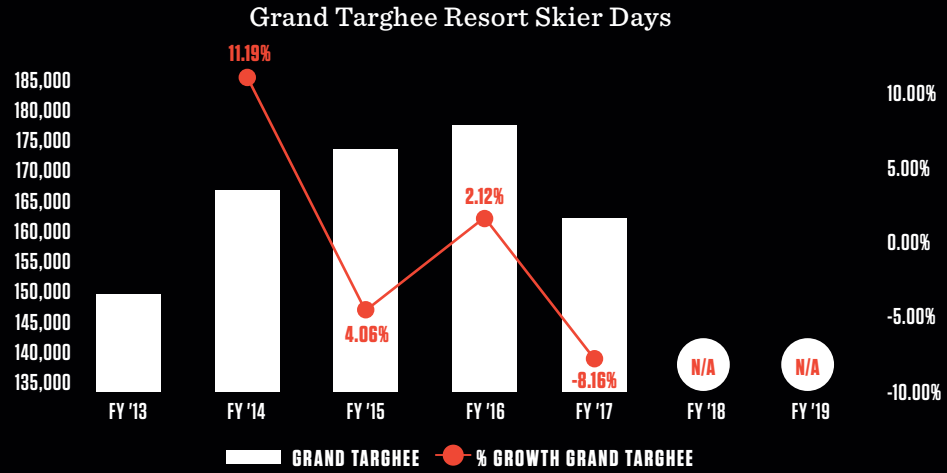
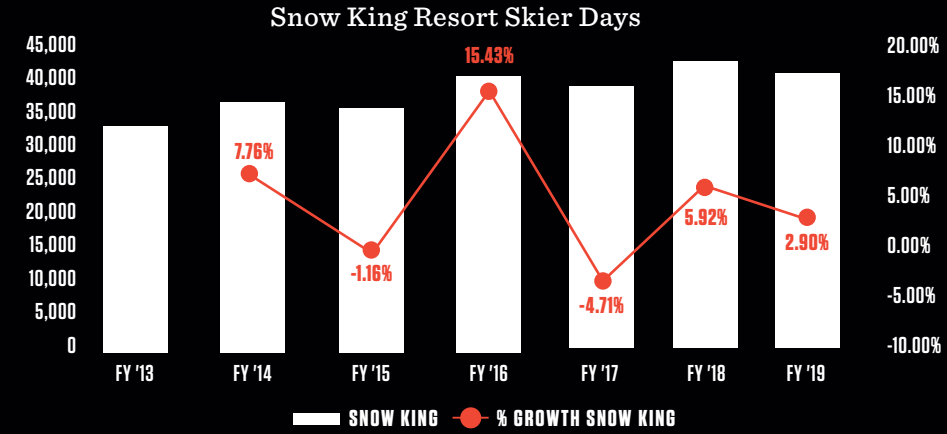
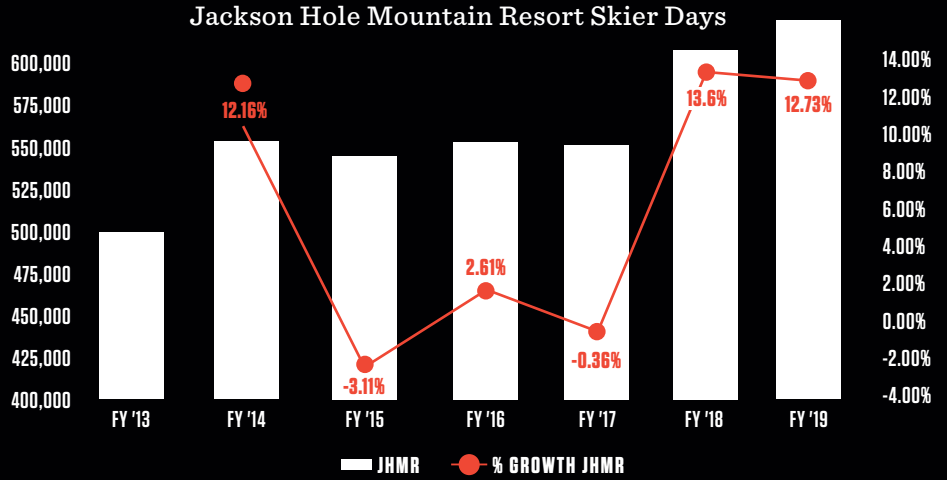
SPRING PEOPLE'S MARKET



WILDLY CREATIVE



SKIER VISITATION

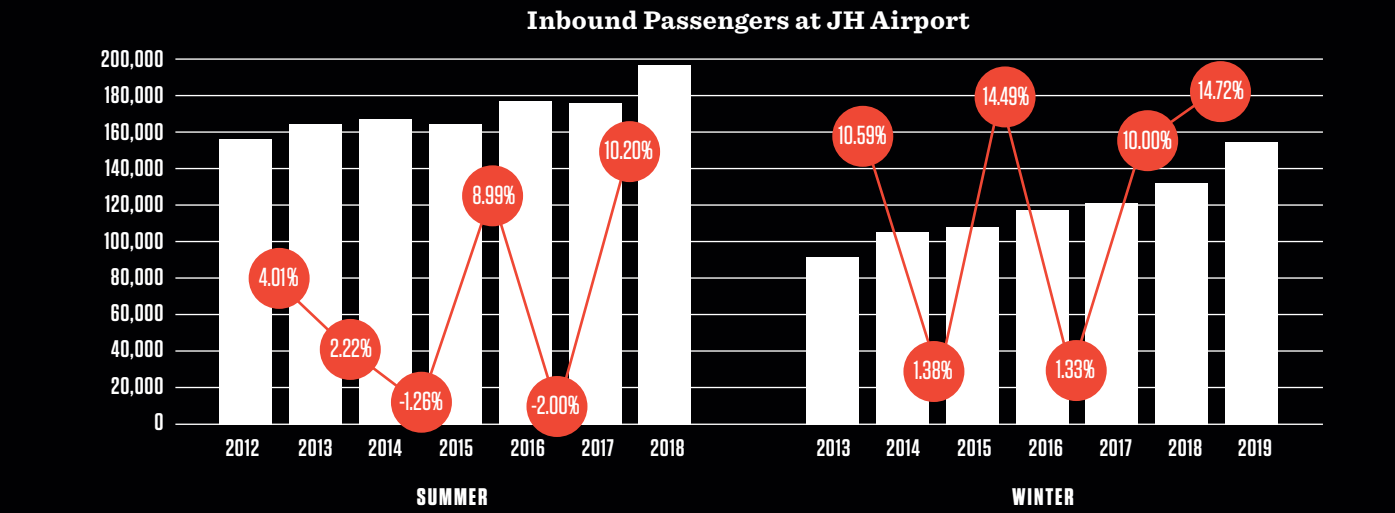


SOURCE: JACKSON HOLE MOUNTAIN RESORT; SNOW KING RESORT; GRAND TARGHEE RESORT

INBOUND PASSENGERS BY SEASON



12 NONSTOP FLIGHTS FROM AROUND THE COUNTRY



SOURCE: JH AIR

CAMPAIGN VISUALS & STATS

TAG LOCATIONS RESPONSIBLY. KEEP JACKSON HOLE WILD.

When you tag a photo with a specific location, the beauty of natural beauty delivers. Use the geo-tagging location. "Tag Responsibly, Keep Jackson Hole Wild" is most people's best practice for the beauty of the wild.

[VISITJACKSONHOLE.COM/SUSTAINABILITY](#)

ONE LITTLE TAG. ONE BIG PROBLEM.

When you tag a photo with a specific location, the beauty of natural beauty delivers. Use the geo-tagging location. "Tag Responsibly, Keep Jackson Hole Wild" is most people's best practice for the beauty of the wild.

[VISITJACKSONHOLE.COM/SUSTAINABILITY](#)

KEEP JACKSON HOLE WILD.

The Jackson Hole community has always been a champion of the wildlife, wild places, and wild culture that remains the foundation of the last true mountain town. While you're here, we're counting on you to play a part. Join us in taking steps to ensure the wonder of this rare place never fades.

- USE PUBLIC TRAILS: Trails in the world's best. Use the STAY WILD app. Consider taking the STAY WILD bus or walking. And if you need a car, go electric.
- ROAD TO ZERO WASTE: REUSE AND RECYCLE. Leave no trace whenever you go. Use a reusable bag. Take short showers. Recycle all that you can.
- SAVE WILDLIFE SPACE: Wildlife shares their habitat with us. Never approach or feed any animals. Stay at least 100 yards from bears and wolves, and 25 yards from all other wildlife.
- STAY ON TRAILS: Trails are made to human environmental impact. Obey all posted signs and respect boundaries.
- TAG LOCATIONS RESPONSIBLY: Geo-tagging photos on social media creates a map of human traffic, increasing stress on delicate habitats. Post the photo. Thank the tag.
- GO FORTH AND CONSERVE: Being the spirit of Jackson Hole with you where you roam. The small actions you take make a big difference in preserving special places for generations to come.

Together, we can keep Jackson Hole wild. Learn more at [visitjacksonhole.com/sustainability](#)

HOW MANY LIKES IS A PATCH OF DEAD WILDFLOWERS WORTH?

Wildflowers are a beautiful sight. But when they're trampled, they can die. So please, take a moment to appreciate the beauty of the wildflowers without stepping on them. The small actions you take make a big difference in preserving special places for generations to come.

[VISITJACKSONHOLE.COM/SUSTAINABILITY](#)

BLACK SHEEP ROAM FREELY HERE.

NOT ALL COWBOYS RIDE HORSES.

LOSE YOUR SIGNAL. FIND YOURSELF.

DISCOVER MORE >>

JACKSON HOLE STAY WILD.

FIVE STAR HOTELS. FIVE MILLION STAR SKIES.

DISCOVER MORE >>

JACKSON HOLE STAY WILD.

AWARDS

2018-2019 WINTER CAMPAIGN HIGHLIGHTS

160,000,000

PAID MEDIA IMPRESSIONS

217,000,000

TAG RESPONSIBLY FREE MEDIA IMPRESSIONS

4.6%

TOURISM GROWTH YOY

5,000

TAG RESPONSIBLY, GEO TAGS

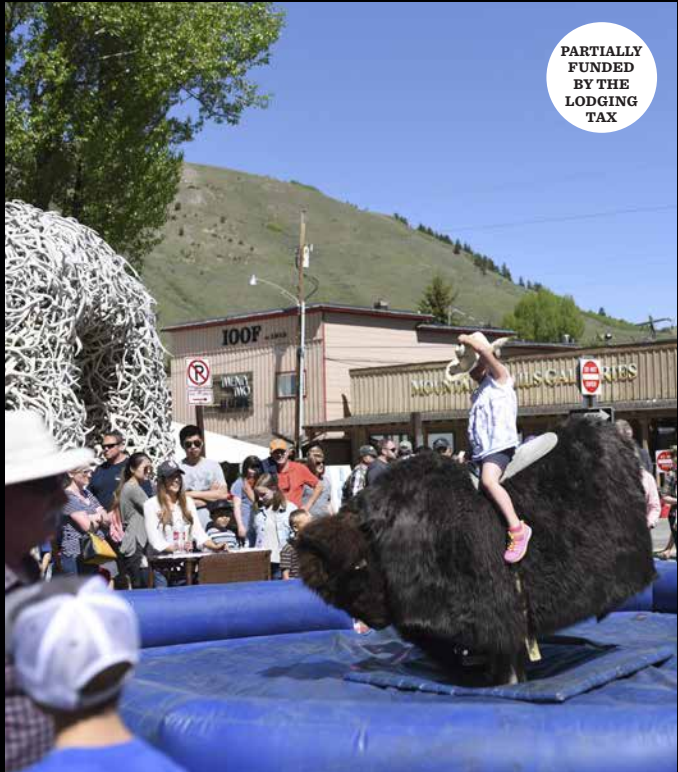
56,564

TOTAL SOCIAL MEDIA FANS, ADDING 32,627 NEW FANS 10/1/18-3/31/19

33



JHSC MOOSE CHASE



OLD WEST DAYS



SPECIAL OLYMPICS



WORLD CHAMPIONSHIP SNOWMOBILE HILL CLIMB



JACKSON HOLE SKI & SNOWBOARD CLUB



JACKSON HOLE HISTORICAL SOCIETY



4JacksonHole.org

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